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ABSTRACT

This Technical Committee Report prepared by industry representatives in Idaho lists the skills currently necessary for an employee in that state to obtain a job as a business systems specialist, retain a job once hired, and advance in that occupational field. (Task lists are grouped according to duty areas generally used in industry settings, and are used as the basis for modules in the statewide curriculum guide development process and for generating student profiles.) The first section of the guide is the task profile, which provides the Idaho code number for the occupation and outlines major concepts/content, laboratory activities, teaching considerations, and instructional units. The guide then lists the following 25 task areas with subtasks (competencies) for business systems specialists: employability skills; telephone-related skills; mathematical computations; keyboarding/typewriting; filing; business records; communication; information processing; consumer economics; mail handling; reprography; leadership skills; decision making; management activities; dictation and transcription; legal specialty; medical specialty activities; information processing specialty activities; word processing specialty activities; insurance specialty activities; desktop publishing specialty activities; accounting specialty activities; telecommunications specialty activities; data processing specialty activities; and networking specialty activities. (KC)

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TECHNICAL COMMITTEE REPORT FOR

BUSINESS SYSTEMS SPECIALIST

Invest in Success

IDAHO VTE VOCATIONAL TECHNICAL EDUCATION

STATE DIVISION OF VOCATIONAL EDUCATION

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INTRODUCTION

The curriculum development process undertaken by the Idaho Division of Vocational Education involves the active use of industry personnel. Industry personnel comprise the sole membership on Technical Committees which are responsible for the development of Task Lists for each program. A Technical Committee Report is prepared on completion of the Committee's assignment. This publication is the Technical Committee Report.

The Task List prepared in the Technical Committee Report reflect the current trends and skills necessary for an employee to: 1) Obtain a job in Idaho's industry, 2) retain a job once hired, and, 3) to advance in the occupational field. Task Lists are grouped according to Duty areas generally used in industry settings. Duty areas are used as the basis for modules in the Statewide Curriculum Guide development process. The Technical Committee segment is the single most significant step in the curriculum development process. All future curriculum activities are predicated on the premise that an accurate picture of industry needs are reflected in the Task List.

Instructional personnel are selected to develop the Statewide Curriculum Guide. These instructors write Performance Objectives for each Task and the subsequent Enabling Objectives for each Performance Objective. The committee members prepare all material in a competency-based format so as to have an effective and efficient methodology for determining student progress. The Statewide Guides are designed as the prime determiner of program content. All programs must follow the established Guide in order to be approved for operation. Any deviation from this Guide requires written approval from the respective program supervisor at the Division of Vocational Education. It is not the intent of the Division that all programs be designed to be exactly the same, but assurance is needed to ensure that the program meets the minimum standards for operation, based on the community needs, equipment, and facilities available to the local school or institution.

The Technical Committee Report does not dictate the level of instruction The Task List developed represents the entire occupational field. Schools and Institutions determine what skills can be taught and what depth of instruction can be provided. They must choose the Tasks to be taught from the Technical Committee Report but are free to determine how many or which ones can be incorporated into their program.

The Technical Committee Report is also used as the primary list for generating Student Profiles. These Profiles are used as a cumulative record of each student's progress. They are printed in a folder format and have levels of performance scales for each Task so that student competence can be recorded for individual skills or tasks. This document will become the main component for Articulation activities in the event that the student desires to go on for additional training or education.

ACKNOWLEDGEMENTS

The Technical Committee process involves personnel from industry who are selected by the Division with assistance from the State Council on Vocational Education. People who serve on the Committees are nominated by local administrators. They generally come from local advisory committees for existing Vocational Education programs or are community representatives in a capacity to provide the necessary information about industry needs. These people serve with the approval of their employers and give their time and energies to the project without cost. The Division provides reimbursement for per diem and travel. We are indebted greatly to these industry representatives and to their employers for the resources so freely given to the pursuit of ensuring that Idaho students receive the most current training and education possible and that which is demanded by industry.

To this end, the Division recognizes the following people who served on the Business Systems Specialist Technical Committee: Bud Albin, Idaho Falls; Ruby Denkers, Pocatello; Lois Emerson, Lewiston; Don Etter, Mountain Home; Denise Metcalf, Twin Falls; Linda Page, Boise; Loretta Reed, Boise; Doug Schedler, Coeur d'Alene, and Denese Scrowther, Pocatello.

Your support and assistance was very greatly appreciated. Your patience for enduring the educational process is also noted. The students and instructional staff will be much more able to accomplish their respective goals as a result of your contributions.

Dan Petersen, Supervisor
Business and Office Education

Don Eshelby
Director of Program Services

CURRICULUM FRAMEWORK PROGRAM AREA: BUSINESS EDUCATION, Revision 6/22/90

IDAHO DIVISION OF VOCATIONAL EDUCATION REVISION DATE: JUNE, 1990

PROGRAM TITLE: BUSINESS SYSTEMS SPECIALIST

IDAHO CODE NUMBER: 4070 CIP#: 07.0601

I. MAJOR CONCEPTS/CONTENT: **The purpose of this program is to prepare students for employment as business systems specialists, public information clerks, document specialists, office management trainees, information processing managers, information processing sales representatives, phototypesetting managers, electronic workstation specialists, correspondence specialists, correspondence supervisors, telecommunication supervisors, software applications supervisors, office supervisors, supervisors of records and information clerks, office assistants, records supervisors, files supervisors, office systems managers, desktop publishing supervisors, administrative secretaries, senior administrative secretaries, executive office administrators, administrative assistants, or directors of information support systems. Students who also complete one or more of the specialty areas will be prepared for employment in a more specific business related occupation. This program is also designed to provide supplemental training for persons previously or currently employed in these occupations.**

The content prepares individuals to assist management by expediting and facilitating the maintenance and production of correspondence and records; performing telephone functions; and planning. The content may include office functions in legal, medical, word processing, word/information, software application, insurance, and accounting areas. The content prepares individuals to use keyboards in a variety of activities, including recordkeeping duties, maintaining basic personnel information, and providing support for management while continuing to perform routine secretarial duties.

II. LABORATORY ACTIVITIES: **Laboratory activities are an integral part of this program and include the use of keyboarding/typewriting systems, calculators, dictation/transcription equipment, computers, and peripheral equipment.**

III. SPECIAL NOTE: **Business Professionals of America is the appropriate vocational student organization for providing leadership experiences and for reinforcing specific vocational skills. When provided, these activities are considered an integral part of this instructional program.**

The cooperative method of instruction is appropriate for this program. Whenever the cooperative method is offered, the following is required for each student: a training plan, signed by the student, teacher and employer, which includes instructional objectives and a list of on-the-job and in school learning experiences; a work station which reflects equipment, skills and tasks which are relevant to the occupation which the student has chosen as a career goal. The student must receive compensation for work performed.

Non-paid internships and on-the-job work experiences can also be used to supplement classroom instruction. However, instructors must be aware of fair-labor legal requirements related to these two options.

The typical length of this program for the average achieving student is 900 hours or the time required to receive an Business Systems Specialist certificate.

IV. **INSTRUCTIONAL UNITS: After successfully completing this program, the student will be able to:**

01. **Demonstrate employability skills and habits.**
02. **Perform telephone related skills.**
03. **Perform math computations.**
04. **Perform keyboarding/typewriting activities.**
05. **Perform filing activities.**
06. **Perform business records activities.**
07. **Perform communication activities.**
08. **Perform information processing activities.**
09. **Identify consumer economic terms and concepts.**
10. **Perform mail handling activities.**
11. **Demonstrate a knowledge of reprographic activities.**
12. **Develop leadership skills.**
13. **Perform decision making activities.**
14. **Perform management activities.**
15. **Perform dictation/transcription activities.**

Students specializing in one of the following areas, must complete the standards within that specialty area:

16. **Perform legal specialty activities.**
17. **Perform medical specialty activities.**
18. **Perform information processing specialty activities.**
19. **Perform word processing specialty activities.**
20. **Perform insurance specialty activities.**
21. **Perform desktop publishing specialty activities.**
22. **Perform accounting specialty activities.**
23. **Perform telecommunications specialty activities.**
24. **Perform data processing specialty activities.**
25. **Perform networking specialty activities**

1.0 DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

The student will be able to:

- **01.01 Identify employment opportunities.**
- **01.02 Apply employment seeking skills.**
- **01.03 Interpret employment capabilities.**
- **01.04 Demonstrate appropriate work behavior.**
- **01.05 Maintain safe and healthy environment.**
- **01.06 Maintain business-like image.**
- **01.07 Maintain effective working relationships with others.**
- **01.08 Communicate effectively on the job.**
- **01.09 Adapt to change.**
- **01.10 Demonstrate a knowledge of business laws/principles.**
- **01.11 Develop appropriate grooming habits.**
- **01.12 Demonstrate a knowledge of human relations skills.**

02.0 PERFORM TELEPHONE RELATED SKILLS

The student will be able to:

- **02.01 Identify telephone systems and types of calls.**
- **02.02 Identify telephone services.**
- **02.03 Locate telephone numbers.**
- **02.04 Demonstrate techniques of answering and placing calls.**
- **02.05 Record messages.**
- **02.06 Demonstrate procedures for screening & transferring calls.**
- **02.07 Identify procedures for placing a conference call.**

03.0 PERFORM MATH COMPUTATIONS

The student will be able to:

- **03.01 Solve addition, subtraction, multiplication, and division problems manually.**
- **03.02 Solve addition, subtraction, multiplication, and division problems using a calculator.**
- **03.03 Solve problems involving percentages and discounts using a calculator.**
- **03.04 Solve problems involving comparison shopping using a calculator.**
- **03.05 Interpret charts, graphs and tables.**
- **03.06 Solve finance charge and annual percentage rate problems using a calculator.**
- **03.07 Determine elapsed time between two events, stated in seconds, minutes, hours, days, weeks, months, or years.**
- **03.08 Solve problems involving decimals and fractions.**

03.09 **Determine whether sufficient, insufficient, or extraneous information is given for solving a problem.**
03.10 **Solve problems involving perimeter or area of a rectangular region.**
03.11 **Solve problems involving length, width or height.**
03.12 **Solve problems involving capacity.**
03.13 **Solve problems using metric units.**
03.14 **Read and verify the totals on a print-out.**

04.0 **PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES**
The student will be able to:

04.01 **Demonstrate keyboarding/typewriting techniques.**
04.02 **Identify operative parts of keyboarding equipment.**
04.03 **Identify formatting principles.**
04.04 **Demonstrate speed and accuracy in typing straight-copy material.**
04.05 **Key/type business letters and envelopes.**
04.06 **Key/type interoffice memoranda.**
04.07 **Key/type tabulated information.**
04.08 **Key/type a two-page letter.**
04.09 **Key/type business letters containing special features, enumerated items and tabulated material requiring different sizes of stationery.**
04.10 **Key/type a memorandum to multiple recipients and address interoffice envelopes.**
04.11 **Key/type labels.**
04.12 **Key/type a report using footnotes or endnotes.**
04.13 **Key/type multi-copy preprinted business forms.**
04.14 **Key/type a news release.**
04.15 **Key/type minutes of a meeting.**
04.16 **Key/type tables in ruled and boxed form.**
04.17 **Key/type material from handwritten copy.**
04.18 **Key/type a standardized document by merging selected paragraphs and variable information.**
04.19 **Key/type from rough draft copy containing proofreaders' marks.**
04.20 **Key/type different sizes of documents.**

05.0 **PERFORM FILING ACTIVITIES**
The student will be able to:

05.01 **Index, code, sort, and store materials alphabetically.**
05.02 **Identify types of filing supplies, equipment, and procedures.**
05.03 **Index, code, sort, and store numerically.**
05.04 **Retrieve materials from files.**
05.05 **Cross-reference materials in the alphabetic, numeric, alpha-numeric, geographic, and subject filing systems.**
05.06 **Identify problems in existing filing systems.**
05.07 **Describe procedure for initial inventory of records.**
05.08 **Search for and investigate information in files.**

05.09 Define records management terms.
05.10 Index, code, sort, and file correspondence geographically, alphabetically, chronologically, numerically, alpha-numerically and by subject.
05.11 Describe methods of protecting vital records.
05.12 Describe appropriate actions for the retention and disposal of records.
05.13 Compare characteristics of centralized and decentralized filing systems.
05.14 Classify records into vital, useful, and nonessential categories.
05.15 Compare manual with electrical/automated filing systems.

06.0 PERFORM BUSINESS RECORDS ACTIVITIES

The student will be able to:

06.01 Prepare checks and stubs.
06.02 Endorse checks using special endorsement.
06.03 Prepare a deposit slip/ticket and adjust checkbook.
06.04 Prepare bank reconciliations.
06.05 Prepare purchase requisitions.
06.06 Prepare purchase orders.
06.07 Prepare invoices.
06.08 Prepare sales slips.
06.09 Maintain petty cash records.
06.10 Demonstrate a knowledge of accounting cycles.

07.0 PERFORM COMMUNICATION ACTIVITIES

The student will be able to:

07.01 Follow oral and written instructions.
07.02 Demonstrate appropriate telephone procedures for telecommunications.
07.03 Compose business correspondence and related documents.
07.04 Prepare, outline, and deliver a short oral presentation.
07.05 Participate in group discussion as a member and as a leader.
07.06 Obtain appropriate information from graphics, maps, or signs.
07.07 Locate and record information retrieved from written resources, including current business periodicals.
07.08 Dictate using recording equipment.
07.09 Annotate letters, reports, and/or news articles.
07.10 Research and compose a document containing statistical information.
07.11 Spell and define words, including business terms.
07.12 Define terms associated with communications.
07.13 Edit documents using proofreaders' marks.
07.14 Prepare visual material to support an oral presentation.

08.0 PERFORM INFORMATION PROCESSING ACTIVITIES

The student will be able to:

- **08.01 Demonstrate knowledge of computer systems.**
- **08.02 Locate requested information on a computer printout.**
- **08.03 Identify applications of computers in business.**
- **08.04 Identify terms commonly used in information processing.**
- **08.05 Identify automated business systems, equipment components and electronic media.**
- **08.06 Edit letters and documents using automated equipment.**
- **08.07 Input, store, and output letters from handwritten or typed material on automated equipment.**
- **08.08 Input, store, and output dictated letters and documents on automated equipment.**
- **08.09 Input, store, and output tabulated documents from handwritten or typed material on automated equipment.**
- **08.10 Revise stored documents and output them on automated equipment.**
- **08.11 Sequence and define the steps of an information processing cycle.**
- **08.12 Input numeric data.**
- **08.13 Use office operations manual.**
- **08.14 Develop a flowchart.**
- **08.15 Perform "start-up" procedures on a computer system.**
- **08.16 Develop a component of an office operations manual.**
- **08.17 Perform computer activities using data base, spreadsheet, communications and graphics software.**
- **08.18 Edit and verify printout information.**
- **08.19 Verify printout totals.**

09.0 IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS

The student will be able to:

- **09.01 Identify basic concepts of the free enterprise economic system.**
- **09.02 Identify basic types and sources of consumer credit.**
- **09.03 Identify elements of a contract.**
- **09.04 Identify advantages and disadvantages of consumer credit.**

10.0 PERFORM MAIL HANDLING ACTIVITIES

The student will be able to:

- **10.01 Classify mail.**
- **10.02 Locate ZIP codes.**
- **10.03 Process mail.**
- **10.04 Select special mail services.**
- **10.05 Identify electronic mail services.**

11.0 DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES

The student will be able to:

11.01 Identify characteristics of reprographic methods.
11.02 Determine best reprographic methods to use.
11.03 Define terms used in reprographics.
11.04 Identify characteristics of paper.
11.05 Determine appropriate copyright applications.

12.0 DEVELOP LEADERSHIP SKILLS

The student will be able to:

12.01 Prepare an agenda.
12.02 Determine appropriate action in situations requiring application of business ethics.
12.03 Conduct an orderly meeting.
12.04 Greet and introduce individuals.
12.05 Demonstrate knowledge of professional organizations.
12.06 Set priorities.
12.07 Delegate responsibilities.

13.0 PERFORM DECISION MAKING ACTIVITIES

The student will be able to:

13.01 List the steps in problem solving.
13.02 Determine the proper priority of work.
13.03 Prepare a day's schedule for an employer.
13.04 Choose appropriate action in situations requiring application of business ethics.
13.05 Choose appropriate action in situations requiring following a chain of command.
13.06 Choose appropriate action in situations requiring effective time management.
13.07 Identify ways to assign work to others.
13.08 Determine preventive actions for office communication problems.
13.09 Select the best ways to handle confidential information.
13.10 Identify the best way to provide constructive feedback on improper behavior.
13.11 Identify options for solving personnel problems.
13.12 Choose appropriate action in solving problems involving violation of business principles.
13.13 Demonstrate appropriate office behavior.
13.14 Select items for new employee orientation.
13.15 Select and delegate tasks.

14.0 PERFORM MANAGEMENT ACTIVITIES

The student will be able to:

14.01 Identify management styles.
14.02 Prepare managerial reports about production, personnel, equipment, and operational costs.
14.03 Set priorities.
14.04 Develop procedures for efficient work flow.
14.05 Conduct performance appraisals, set goals, and recommend training.
14.06 Discuss elements of a general budget.
14.07 Select appropriate action applying business management practices.
14.08 Apply time management skills to office schedule.
14.09 Develop short/long range plans including Equal Access/Equal Opportunity (EAEO) guidelines.
14.10 Develop procedures for handling grievances.
14.11 Evaluate job applicants based upon interviews.
14.12 Recommend employees for promotion.
14.13 Budget office expenses.
14.14 Sketch layout of an office using principles of ergonomics.
14.15 Select vendors from whom to purchase office supplies.
14.16 Organize meetings/seminars.
14.17 Prepare travel arrangements.

15.0 PERFORM DICTATION/TRANSCRIPTION ACTIVITIES

The student will be able to:

15.01 Demonstrate techniques in machine dictation and transcription.
15.02 Transcribe recorded dictation of business related documents into mailable form.
15.03 Take notes and transcribe into mailable form.

SPECIALTY AREAS

16.0 PERFORM LEGAL SPECIALTY ACTIVITIES

The student will be able to:

16.01 Select and complete legal documents.
16.02 Schedule appointments and activities.
16.03 Record legal office transactions.
16.04 Demonstrate knowledge of legal terms.
16.05 Locate and record information found in legal references.
16.06 Transcribe from recorded legal dictation/proceedings.
16.07 Prepare and maintain legal records.
16.08 Identify the court in which legal documents should be filed.

17.0 PERFORM MEDICAL SPECIALTY ACTIVITIES

The student will be able to:

17.01 Demonstrate knowledge of diagnostic coding.
17.02 Demonstrate knowledge of procedural coding.
17.03 Determine appropriate response to patient needs.
17.04 Select and complete insurance forms.
17.05 Schedule appointments and activities.
17.06 Record medical office transactions.
17.07 Demonstrate knowledge of medical terms.
17.08 Locate and record information found in medical references.
17.09 Transcribe from recorded medical dictation.
17.10 Prepare medical records.
17.11 Maintain medical records.

18.0 PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES

The student will be able to:

18.01 Edit documents on automated equipment.
18.02 Input, store, and output business documents, including scanners.
18.03 Revise stored documents and output them using automated equipment.
18.04 Demonstrate knowledge of word processing concepts and terms.
18.05 Create business documents using spreadsheet, database, and graphics application software.
18.06 Demonstrate knowledge of the advantages and disadvantages of integrated vs. dedicated software.
18.07 Create and maintain a database.

19.0 PERFORM WORD PROCESSING SPECIALTY ACTIVITIES

The student will be able to:

19.01 Edit documents on automated equipment.
19.02 Input, store, and output business documents including scanners.
19.03 Revise stored documents and output them using automated equipment.
19.04 Demonstrate knowledge of word processing concepts and terms.
19.05 Create business documents using word processing procedures.
19.06 Demonstrate knowledge of various word processing software.

20.0 PERFORM INSURANCE SPECIALTY ACTIVITIES

The student will be able to:

20.01 Select and complete insurance forms.
20.02 Demonstrate knowledge of insurance terms.
20.03 Locate and record information found in insurance manuals.
20.04 Prepare and maintain insurance records.
20.05 Process insurance claims.
20.06 Prepare insurance billing documents.
20.07 Complete insurance documents on automated equipment.

21.0 PERFORM DESKTOP PUBLISHING SPECIALTY ACTIVITIES

The student will be able to:

21.01 Demonstrate knowledge of desktop publishing terms.
21.02 Demonstrate knowledge of communications software/hardware.
21.03 Create documents using integrated software.
21.04 Demonstrate knowledge of the principles of graphic design and layout.
21.05 Identify equipment and materials used in graphic design and layout.
21.06 Create visuals using desktop graphics software.

22.0 PERFORM ACCOUNTING SPECIALTY ACTIVITIES

The student will be able to:

22.01 Prepare payroll records.
22.02 Record transactions in special journals.
22.03 Post journal entries to subsidiary ledgers.
22.04 Record transactions in general journal (journalize).
22.05 Post entries from a general journal to a general ledger.
22.06 Prepare work sheets.
22.07 Prepare income statements.
22.08 Prepare statements of owner's equity.
22.09 Prepare balance sheets.
22.10 Journalize and post adjusting entries.
22.11 Journalize and post closing entries.
22.12 Prepare post closing trial balances.
22.13 Prepare data for a general budget.
22.14 Interpret financial statements.
22.15 Perform accounting functions using an automated system.

23.0 PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES
The student will be able to:

23.01 Demonstrate knowledge of [voice, data, video] telecommunication terms.
23.02 Demonstrate appropriate telephone procedures for telecommunication.
23.03 Select the appropriate medium for transmitting information.
23.04 Compose and send electronic messages using appropriate format and composition.
23.05 Discuss impact of local and wide area networks on the delivery of information.

24.0 PERFORM DATA PROCESSING SPECIALTY ACTIVITIES
The student will be able to:

24.01 Demonstrate knowledge of data processing terms.
24.02 Identify equipment associated with processing of data.
24.03 Demonstrate knowledge of business-computer languages.
24.04 Demonstrate knowledge of operating systems/languages.
24.05 Prepare flow charts for business applications.
24.06 Demonstrate trouble-shooting and diagnostic procedures.

25.0 NETWORKING SPECIALTY ACTIVITIES
The student will be able to:

25.01 Demonstrate knowledge of DOS application.
25.02 Differentiate between various kinds of wiring systems.
25.03 Demonstrate knowledge of various LAN applications.
25.04 Demonstrate knowledge of various randum configurations and compatibility.
25.05 Demonstrate knowledge of security/protocol procedures.
25.06 Demonstrate knowledge of backup and recover files/system.
25.07 Assess needs of office/personnel.
25.08 Interpret technical manuals.
25.09 Prepare operations manual for users.
25.10 Troubleshoot and perform system analysis.

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